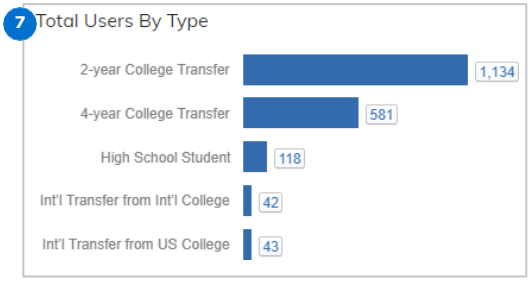
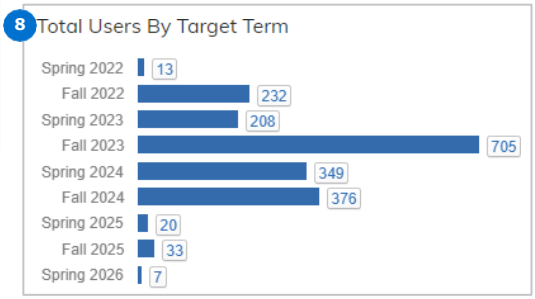
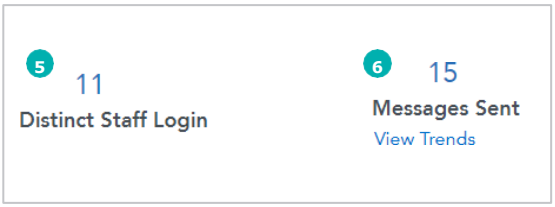
Template 1

Transfer Portal Utilization: Activity Overview







Data Point and Definition	Why It's Important
1. Total Sessions: Total number of unique sessions by any user, with or without an account based on date joined in the selected date range.	Provides insight into overall site traffic, marketing performance, and student engagement.
2. Distinct Users: Total number of user sessions who added at least 3+ course or have an account created in the selected date range, or have an account created.	Indicates an elevated level of user engagement; can be considered your "superusers." Students receive an automated course evaluation leading to time savings for both students and staff. This data also aids in understanding utilization patterns.
3. Accounts Created: Total number of users who have created an account through the platform and their date joined is in the selected date range.	These students should be considered as new inquiries, as they took a significant step by saving their work and providing their information. The calculation of money saved can be tied to theses student inquiries.
4. Account Conversion Rate: Conversion rate based on % of estimated distinct users who created an account.	Shows level of student interest by their follow through to create an account.
5. Distinct Staff Login: The number of distinct individuals logged in to the staff URL in the selected date range.	Provides insight into Transfer team engagement with Transfer Portal.
6. Messages Sent: Total number of messages sent, by users (including anonymous users) within the date range.	Provides timing of messaging to lead to further analysis of question types and signifies a high-level user engagement.
7. Total Users by Type: Total number of users by type, self-selected as a part of account creation	Provides insight into population and demographic breakdown, data can be used to qualify and customize outreach campaigns to prospects.
8. Total Users by Term: Total number of users by date joined. Users who have not selected any type are excluded.	Provides insight into when students are interested in enrolling and can be used by staff to gauge future enrollment projections, view trends, and conduct customized outreach.

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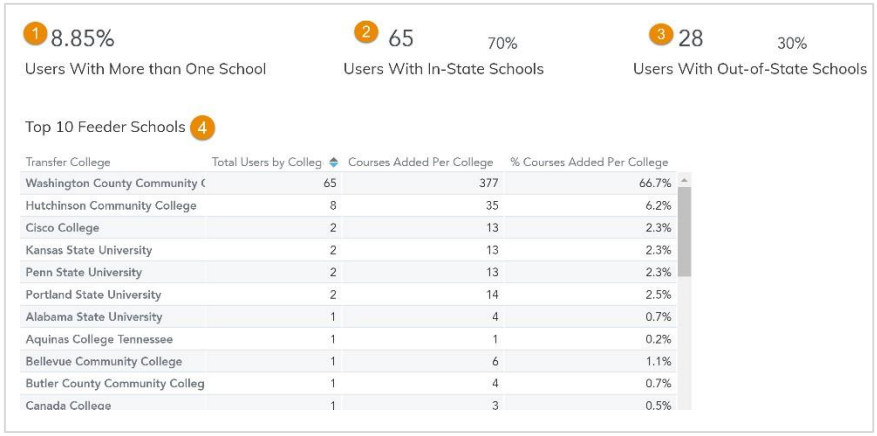
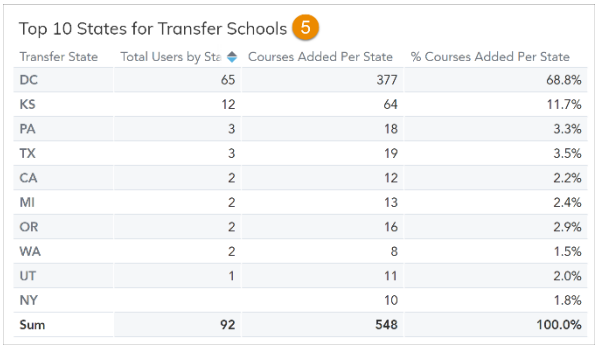
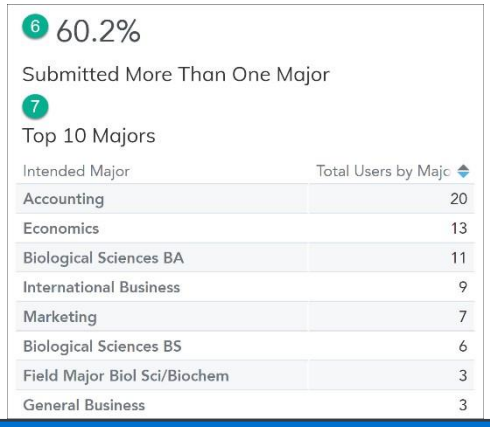
Template 1 Continued

Transfer Portal Utilization: Pipeline Details

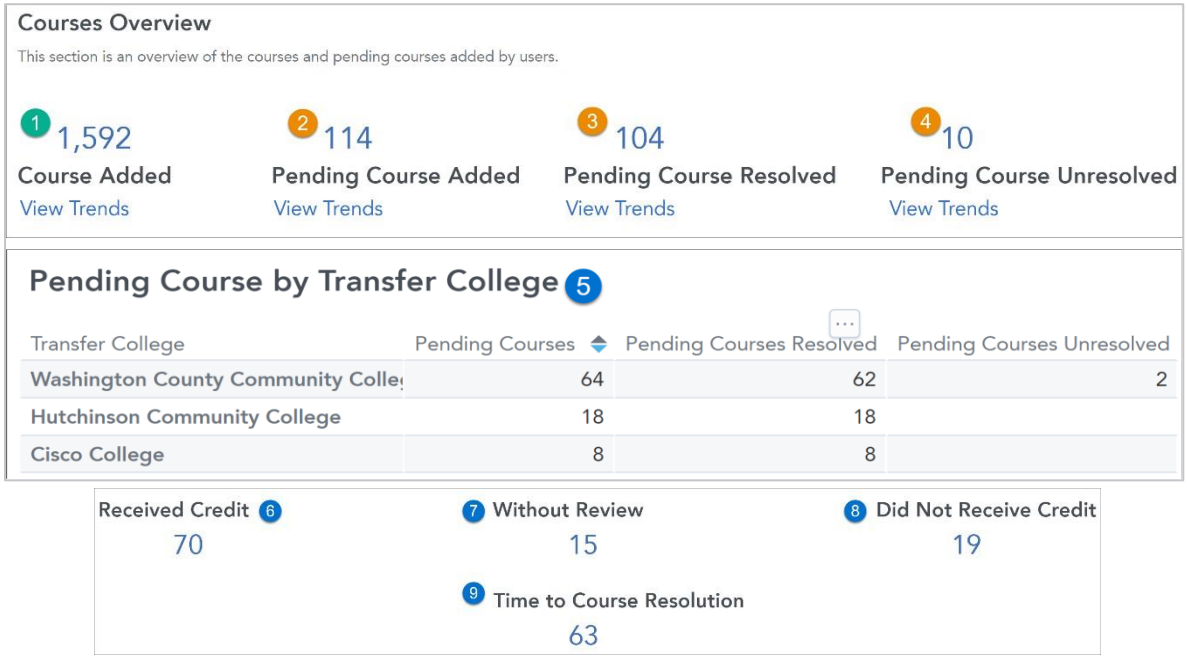






Data Point and Definition	Why It's Important
1. Users With More than One School: % of estimated distinct users who submitted courses from more than one transfer school.	These users have attended more than one institution, possibly transferring multiple times; provides insight into student behavior.
2. Users With In-State Schools: Total number of estimated distinct users who have added at least one course from an in-state institution.	Provides insight into in-state and out-of-state mix and growth opportunities.
3. Users With Out-of-State Schools: Number of estimated distinct users who have not added at least one course from an in-state institution. Null or international locations are classified as out-of-state.	Provides insight into in-state and out-of-state mix and growth opportunities.
4. Top 10 Feeder Schools: Top ten institutions with the most estimated distinct users and the total number of courses they have added.	Provides insight into community college/top feeder relationships and activity, identifies new potential partnerships, and highlights what four-year universities where majority of lateral transfer occurs.
5. Top 10 Feeder States: Top ten states with the most estimated distinct users and the total number of courses they have added from institutions in these states.	Provides insight into in-state and out-of-state mix and growth opportunities.
6. Submitted More Than One Major: % of estimated distinct users who submitted 2 or 3 intended majors.	Provides insight into student behavior and exploration patterns.
7. Top 10 Majors: Top ten intended majors selected by estimated distinct users.	Shows majors with the most interest and student exploration, provides insight into where major-of-interest gaps or growth opportunities (e.g., CC partnership or articulation agreement strategy).

Transfer Portal Utilization: Course Activity



Data Point and Definition	Why It's Important
1. Course Added: Total number of courses submitted that have existing equivalencies.	Considered a proxy for automated 1:1 course evaluation requests which saves student and staff time.
2. Pending Course Added: Total number of pending courses (no prior equivalency) submitted for review.	Provides insight into course equivalency database health, where gaps exist, guides staff capacity considerations, and shows funnel trends and growth opportunities.
3. Pending Course Resolved: Total number of pending courses resolved, regardless of when they were added.	Provides insight into staff capacity and turnaround time.
4. Pending Course Unresolved: Total number of pending courses still unresolved from those added.	Provides insight into staff capacity and turnaround time.
5. Pending Course by Transfer College: List of all institutions where a pending course was submitted.	Students have transfer coursework from these institutions but were unable to find a course equivalency; provides insight into course equivalency gaps and growth opportunities.
6. Received Credit: Total number of pending courses resolved as "Course receives credit" in the selected date range.	The count of courses as received credit represents new course equivalency rules built in the SIS. These additions will be auto matched for future course entries.
7. Without Review: Total number of pending courses resolved as "Course will not be reviewed" in the selected date range.	For various reasons, these courses are not reviewed, and course equivalents are not built. This provides an opportunity to reevaluate why the courses were not received and adjust internal processes accordingly.
8. Did Not Receive Credit: Total number of pending courses resolved as "Course does not received credit (Note required)" in the selected date range.	These courses are not transferable for various reasons, and course equivalencies are not built. This offers an opportunity to reassess why the courses are not receiving credit and make internal process adjustments accordingly.
9. Time To Course Resolution: Average number of days between the date pending courses are submitted and the resolution date.	This number represents the average waiting period for a student to receive a response regarding their pending course request. The data serves to guide the internal credit evaluation process and can prompt adjustments if necessary.

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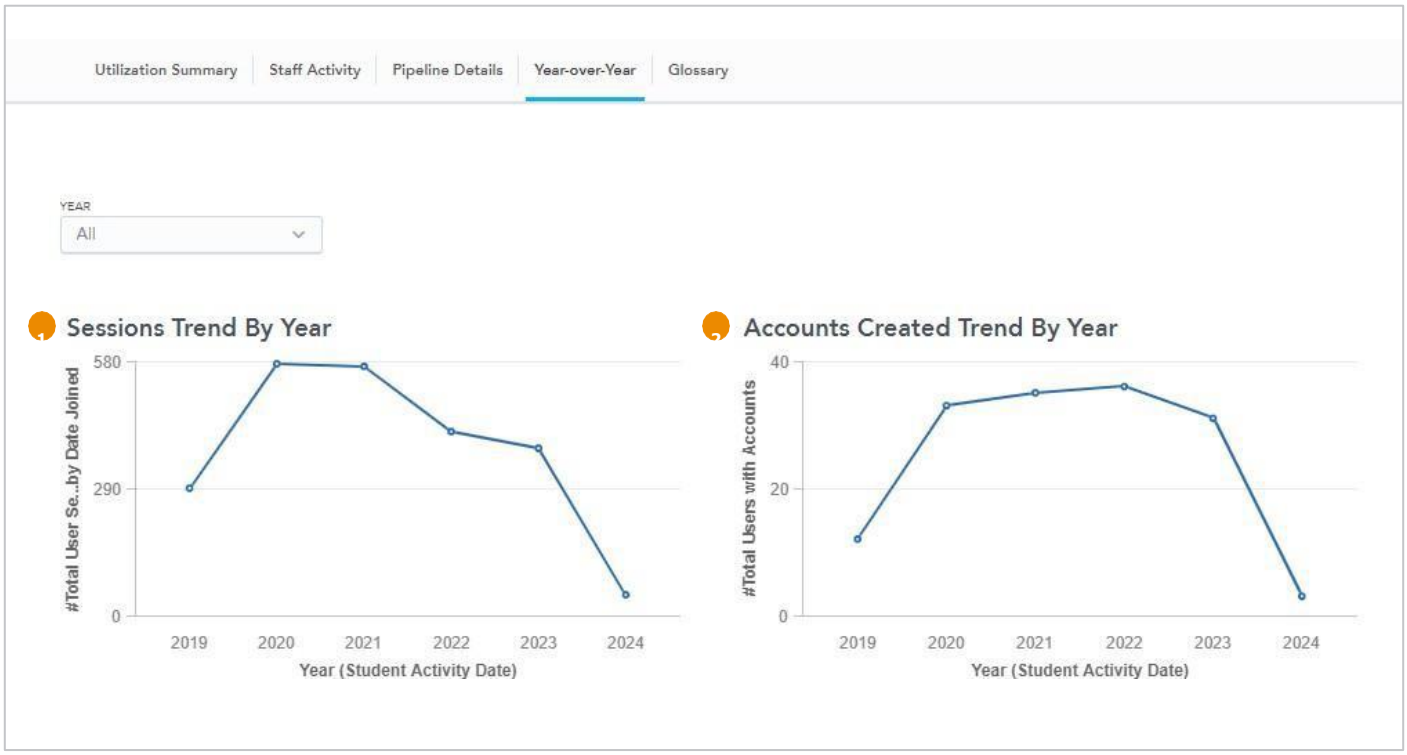
Transfer Portal Utilization: Year-Over-Year



Data Point and Definition	Why It's Important
1. Sessions Trend By Year: This is the trend report showing the total number of unique session be any user, with or without an account based on the years selected from the drop-down.	Provides insight into all user activity with your Transfer Portal across the years. Trends will hopefully follow various transfer initiatives over time.
2. Accounts Created Trend By Year: This is the trend report showing the total number of accounts created through the platform based on the years selected from the drop-down.	This insight is specifically for prospective students who created accounts within your Transfer Portal. The trends here should help evaluate effectiveness of different deep linking or profile creation campaigns.

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